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*A School's Guide to
Purchasing
Washington-Grown
Food*

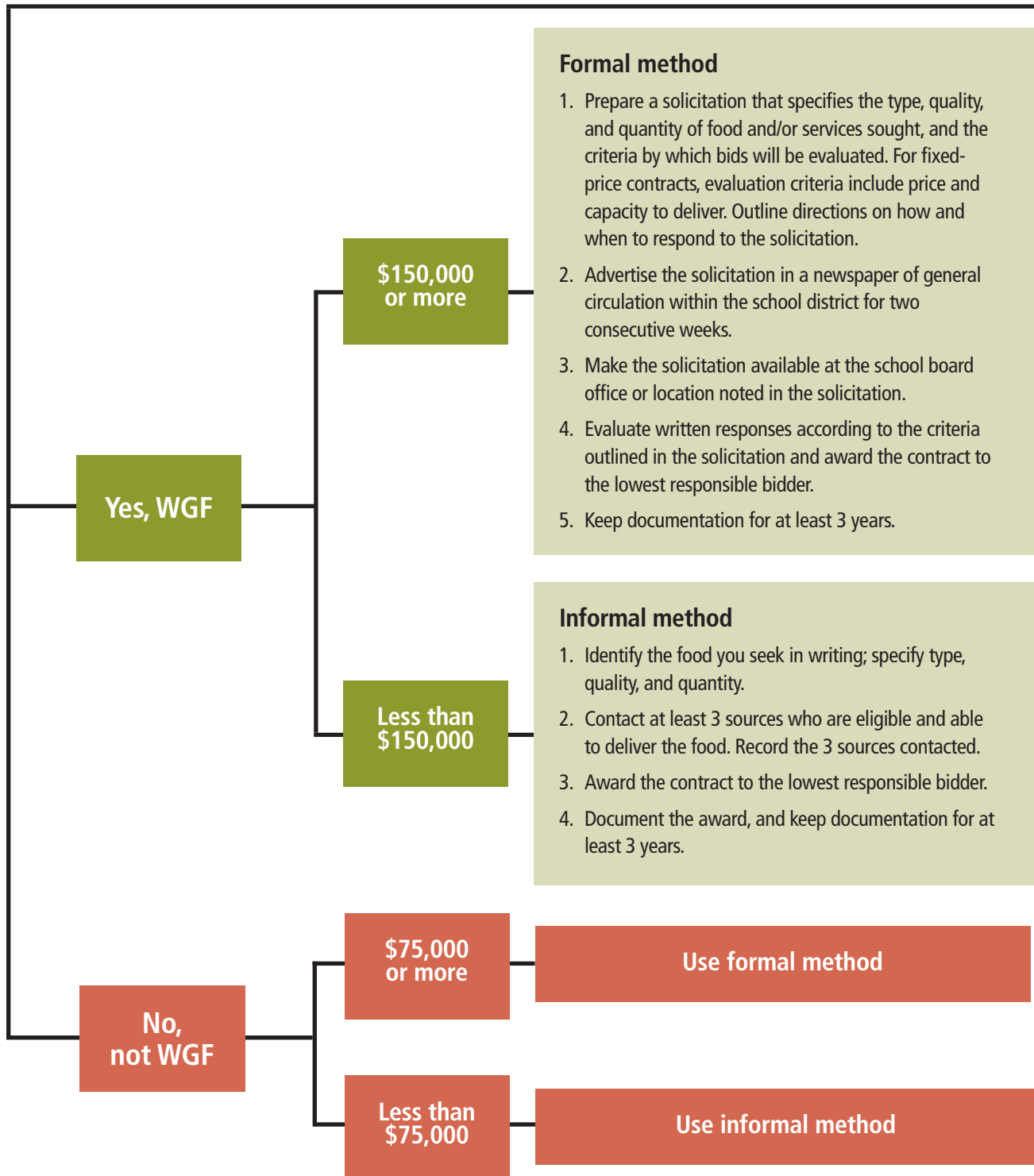
Procurement

Step-by-Step Guide for Purchasing Washington-Grown Food

- 1** Forecasting: Identify the products and quantities you will be purchasing, and estimate the total cost of the purchase.
- 2** Depending on the dollar amount of the purchase, determine whether to use a formal or informal procurement method.
- 3** Plan your procurement procedure, ensuring compliance with federal, state and school district requirements. *XXXXXXXXXXXXXXXXXX*
- 4** Decide what geographic area in Washington you wish to define as “local.”
- 5** Determine how you will apply the geographic preference.
- 6** Where appropriate, incorporate these decisions into school district policy to guide food purchases.
- 7** Clearly communicate your intent to apply a geographic preference and your definition of “local.”
- 8** Clearly define and communicate the evaluation criteria that will be used to select the successful vendor.
- 9** Identify vendor qualifications to meet your needs.
- 10** Write specifications to clearly state what products you want, the attributes of the products, and the level of processing you require.
- 11** State your preferences and how they will be weighted in the evaluation process.
- 12** Develop and communicate a plan for reviewing and selecting the successful bid, proposal or quote.
- 13** Publicize the procurement opportunity to ensure adequate competition and maximize the likelihood of reaching qualified vendors who can supply food from your geographic preference area.
- 14** Fairly evaluate based on the vendor qualifications, specifications and preferences in your procurement request, and award the contract.
- 15** Execute a contract that matches your specifications and preferences from the procurement request.
- 16** Manage the procurement. Monitor and keep documentation on service, product quality, price, and compliance with the contract.

Are you applying a geographic preference for Washington-grown food?

"Washington-grown food" is grown and packed or processed in Washington



Washington State School Food Service Worksheet for Purchasing Locally Grown Food

Washington State Procurement Rules:

RCW 28A.335.190

- ❖ $\geq \$75,000$ = Formal Public Process
- ❖ $\geq \$40,000$ to $< \$75,000$ = Informal Process
(USDA rules say there is no lower threshold, so competitive informal process is required down to \$0)

Local School District Procurement Rules

My District Policy # _____

$\geq \$$ ____,000 = Formal Public Bid Process

$< \$$ ____,000 = Informal Process (3 Quotes)

Note: District rules must be used if they are more restrictive than state and federal rules.

Federal Procurement Law and Contract Rules:

"Common Rule" provision requires:

- ❖ $> \$0$ to $< \$150,000$ = Informal Process
- ❖ $\geq \$150,000$ = Formal Process (use this if buying WA Grown Food, exempt from state law)
- ❖ 7 CFR PART 3016 (c) Concerning procurement of "nonprofit school food service accounts"
 - District will conduct all procurement transactions in a manner providing full and open competition.
- ❖ 7 CFR PART 3016 (d) Method of Procurement

Informal Procurement Process

- ❖ Less than \$75,000 = Not WA Grown Specific
- ❖ Less than \$150,000 = WA Grown
- ❖ Less than \$ _____ = District Policy Amt, if lowest threshold

1. Identify the food/service you seek in writing (or telephone quotes)
 - a. Specific type
 - b. Quality
 - c. Quantity
2. Contact at least 3 sources who are eligible and able to deliver the food.
 - a. Record the date, content of request and 3 sources contacted
 - b. Record their quotes/responses
 - c. Do not disclose amount of any quote until all quotes received
3. Award the contract to the lowest responsible bidder.
4. Document the award and keep documentation for at least 3 years. May be made available for public inspection

Formal Public Bid Process

- ❖ Greater than/equal to \$75,000 Not WA Grown Specific
- ❖ Greater than/equal to \$150,000 WA Grown
- ❖ Greater than/equal to \$ _____ = District Policy Amt, if lowest threshold

1. Prepare a solicitation that specifies foods/services sought:
 - a. Specific type
 - b. Quality
 - c. Quantity
 - d. Criteria by which bids will be evaluated
 - e. Criteria include price and capacity to deliver
2. Clear directions on how and when to respond
3. Advertise the solicitation in a newspaper of general circulation within school district for two consecutive weeks.
4. Make the solicitation available at the school board office or location noticed in solicitation.
5. Open and read bids in public on the date and place named in the document.
6. Evaluate written responses according to the criteria outlined in the solicitation and award the contract to the lowest responsible bidder.
7. Document the award and keep documentation for at least 3 years. May be made available for public inspection.

My District's Current School Year Purchases

• Primary Vendor

_____ Bid Process _____ Contract _____ Annual Amt Invoiced \$ _____

• Category Vendor

_____ Bid Process _____ Contract _____ Annual Amt Invoiced \$ _____

_____ Bid Process _____ Contract _____ Annual Amt Invoiced \$ _____

_____ Bid Process _____ Contract _____ Annual Amt Invoiced \$ _____

_____ Bid Process _____ Contract _____ Annual Amt Invoiced \$ _____

• Small Purchases

_____ Bid Process _____ Contract _____ Annual Amt Invoiced \$ _____

_____ Bid Process _____ Contract _____ Annual Amt Invoiced \$ _____

_____ Bid Process _____ Contract _____ Annual Amt Invoiced \$ _____

_____ Bid Process _____ Contract _____ Annual Amt Invoiced \$ _____

BEFORE YOU START THE PROCUREMENT PROCESS	Notes:
<p><input type="checkbox"/> Forecasting: Identify the products and quantities you will be purchasing, and estimate the total cost of the purchase.</p> <p>- Create a master list of produce products or run or request a report from your current vendor(s)</p> <p>- Add any new items you would like to included for upcoming year</p>	
<p><input type="checkbox"/> Depending on the dollar amount of the purchase, determine whether to use a formal or informal procurement method</p> <p>- Determine how much your district spends on produce category in a school year.</p>	<p>Answer:</p>
<p><input type="checkbox"/> Plan your procurement procedure, ensuring compliance with federal, state and school district requirements.</p>	
<p><input type="checkbox"/> Decide what geographic area in Washington you wish to define as “local.”</p> <p>- Grown within 100 miles, Grown within WA State, etc.</p>	<p>“Washington-grown food” is defined by RCW 15.64.060 as “grown and packed or processed in Washington.”</p> <p>Answer:</p>
<p><input type="checkbox"/> Determine how you will apply the geographic preference.</p> <p>- See models(Chapter 4) on Point System, Price Percentage Point System, USDA Point System</p>	<p>Decide on Formal Bid Contract or Quote Template.</p>
<p><input type="checkbox"/> Where appropriate, incorporate these decisions into school district policy.</p>	

PUTTING TOGETHER THE PROCUREMENT	Notes:
<input type="checkbox"/> Clearly communicate your intent to apply a geographic preference and your definition of “local.”	<i>Intent Language, Geographic Preference Area Definition and Geographic Preference on how it will be weighted. (Resources Tab 2)</i>
<input type="checkbox"/> Clearly define and communicate the evaluation criteria that will be used to select the successful vendor.	
<input type="checkbox"/> Identify vendor qualifications that meet your needs.	
<input type="checkbox"/> Write specifications to clearly state what products you want, the attributes of the products, and the level of processing you require.	
<input type="checkbox"/> State your preferences and how they will be weighted in the evaluation process.	
<input type="checkbox"/> Develop and communicate a plan for reviewing and selecting the successful bid, proposal or quote.	

<div> <div>IMPLEMENTING THE PROCUREMENT PROCESS</div> <div>Notes:</div> </div>	
<input type="checkbox"/> Publicize the procurement opportunity to ensure adequate competition and maximize the likelihood of reaching qualified vendors who can supply food from your geographic preference area. <ul style="list-style-type: none"> - <i>Identify Vendors who are eligible and able</i> <ul style="list-style-type: none"> • <i>I.e. Ability to perform successfully, Integrity, Compliance with Public Policy, Record of Past Performance, Financial and Technical Resources</i> 	
<input type="checkbox"/> Fairly evaluate based on the vendor qualifications, specifications and preferences in your procurement request, and award the contract.	
<input type="checkbox"/> Execute a contract that matches your procurement specifications and preferences from the procurement request.	
<input type="checkbox"/> Manage the procurement. Monitor and keep documentation on service, product quality, price, and compliance with the contract.	

Model Geographic Preference Bid Language for School Food Procurement

OPTION 1: “Local” defined as Washington Grown Food

Credit: ChangeLab Solutions

1. Applying a geographic preference for Washington grown products for school food procurement [in Washington State].
 - a. This school district (“District”) or school food authority (“SFA”) desires to serve Washington grown products to its students.
 - b. Under federal law, this District [or “this SFA”], as the purchasing institution, has the authority not only to apply a “local” geographic preference to minimally processed foods, but also to determine what is “local” for the purposes of United States Department of Agriculture (USDA) programs such as the National School Lunch Program, the School Breakfast Program, the Fresh Fruit & Vegetable Program, the Special Milk Program, the Child and Adult Care Food Program, the Summer Food Service Program, and the Department of Defense Fresh Program.
 - c. This district [or “This SFA”] defines “locally grown products” as “Washington grown,” as defined under Local Farms – Healthy Kids Act section 6 (Revised Code of Washington section 28A.335.190). That definition states, “grown and packed or processed in Washington.” This district [or “This SFA”] will apply applicable federal procurement procedures.
 - d. As required under federal law, this district [or “this SFA”] will provide a price percentage preference of [XX] % [or insert other point calculation system] during evaluation of bids to “locally grown products” purchased for school food procurement, as defined under this geographic preference.
 - e. Pursuant to USDA regulations, the geographic preference in this section is applied only to “minimally processed” agricultural products that retain their inherent character.

Model Geographic Preference Language for WA School Food Procurement

OPTION 2: Informal bid language

Version 1 (WA Grown definition of local, price preference):

_____ School District seeks to serve Washington-grown products to its students. We are currently seeking quotes for the following items for our [Fresh Fruit and Vegetables Program or other special event or project] for the months of _____ and _____.

We hope to purchase produce items that are grown and packed or processed in Washington State, and will apply a 10% price preference to such products as we review the quotes.

Version 2 (2-tiered, price preference):

The _____ Public Schools Food Service Program desires to serve fresh, locally grown products to its students. To this end, the Food Services Department is seeking to develop a list of vendors that meet all procurement requirements from which quotes may be requested or supplied through weekly Fresh Sheets on an “as needed” basis.

Under federal law, this district, as the purchasing institution, has the authority to apply a “local” geographic preference to minimally processed foods and to determine what is “local” for the purposes of United States Department of Agriculture (USDA) programs such as the National School Lunch Program, the School Breakfast Program, the Fresh Fruits and Vegetable Program, the Special Milk Program, the Child and Adult Care Food Program, the Summer Food Service Program, and the Department of Defense Fresh Program.

This district defines “locally grown products” eligible for this geographic preference at two levels. These levels are:

1. Grown in _____, _____, or _____ Counties
2. Grown in Washington State

As allowed under federal law, the _____ Public Schools will provide a price percentage preference during evaluation of quotes to “locally grown products” purchased for school food procurement as defined under this geographic preference. The price percentage is as follows:

1. Grown in _____, _____, or _____ Counties-5%
2. Grown in Washington State-3%

The price percentage preference means that **for the purposes of comparison**, prices for product grown in one of the 3 counties will be adjusted to a price 5% lower than the price quoted for the product by the vendor or 3% for product grown outside these counties and still within Washington State. The price percentage preference affects the quoted price only for awarding of the quote, not the actual price paid to the vendor.

Product List for Geographic Preference

_____ School District has identified the following products that can be sourced from within _____ [defined geographic preference area]. Please identify which products you will provide from within _____ [geographic preference area], and during which time periods. _____ School District will apply _____ [description of point system, price preference or other specific geographic preference advantage] to vendors who provide these products from within _____ [defined geographic preference area].

[illegible]

[Sample product list adapted from Spokane Public Schools]

PRODUCE ITEMS TO BE PURCHASED

*** Quantities indicated are for evaluation purposes only and are based upon historic consumption. Quantities are not intended to predict future sales and do not indicate a minimum or maximum purchase quantity.**

Qty*	Item	Order Units	Distributor's Cost before mark-up Per Unit (ex: \$21.17/carton)
APPLES, SLICED:			
5 cs	Sweet Apple Slices, bulk	10 / 3lb bags	\$ _____ / _____
45 cs	Apple Slices, packets	100 / 2 oz.	\$ _____ / _____
250 cs	Apple Slices, packets, Gala or Fuji	150 / 2 oz.	\$ _____ / _____
110 cs	Apple Slice/Grape combo packets	100 / 4 oz	\$ _____ / _____
APPLES, WHOLE:			
10cs	Fuji, Extra Fancy, 138 ct.	Carton	\$ _____ / _____
25 cs	Fuji, Extra Fancy, 150 ct.	Carton	\$ _____ / _____
5 cs	Gala, Extra Fancy, 125 ct.	Carton	\$ _____ / _____
35 cs	Golden, Extra Fancy, 138 ct.	Carton	\$ _____ / _____
25 cs	Granny, Extra Fancy, 125 ct.	Carton	\$ _____ / _____
MISCELLANEOUS ITEMS:			
35 cs	Pears, 135 ct.	Carton	\$ _____ / _____
10 cs	Peaches	Case (40 lbs)	\$ _____ / _____

[Sample product list adapted from Iowa State University]

Produce Volume Commitment and Pricing Your pricing should be based on award of each type individually. Please note that date range of availability is seen as a well-informed estimate, and weather-related or other unforeseeable situations could change that. If you would give additional discounts for being awarded the contract for multiple items, please indicate that in the space below

Carrots	Proposed commitment _____ pounds _____ pounds per week @ \$_____ per pound Date Range of availability from WA: _____
Green Cabbage	Proposed commitment _____ pounds _____ pounds per week @ \$_____ per pound Date Range of availability from WA: _____
Cucumbers	Proposed commitment _____ pounds _____ pounds per week @ \$_____ per pound Date Range of availability from WA: _____

Please indicate if you would give a discount if awarded more than one of the above items and how much that discount would be for each item per pound

4.7 Additional Product Offerings Please list the other types of produce you may be able to offer, along with proposed volume availability, price and date range of availability from Washington sources.

_____	Proposed commitment _____ pounds _____ pounds per week @ \$_____ per pound Date Range of availability from WA: _____
_____	Proposed commitment _____ pounds _____ pounds per week @ \$_____ per pound Date Range of availability from WA: _____

AUSTIN INDEPENDENT SCHOOL DISTRICT

FAX REQUEST FOR QUOTATION FQ09-05

AIISD REQUESTOR Judy Schuessler

SCHOOL Food Services

FAX (512) 414-0258

PHONE (512) 414-0258

ADDRESS _____

Please quote, FOB Destination, Freight Included, on the following.

Delivery date(s) may be a factor for awarding of quote(s).

QUOTATION must be FAXED to the *Fax Number* indicated above by the due date Friday, October 24, 2008.

ALL blanks must be completed. In case of discrepancy between Unit Price and Total, the Unit Price shall be considered correct.

ITEM	DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	TOTAL	LEAD TIME
1	Broccoli, whole head- 5 # units U.S. Fancy grade, compact green cluster of buds.	20	units			
2	Cabbage, green - 5 # units U.S. 1 grade; Product shall be green in color with head firm, trimmed and free of wilted or decayed outer leaves.	10	units			
3	Cauliflower, whole head - 5 # units U.S. 1 grade. Color shall be white, or creamy-white, clean, firm, compact curd, with fresh outer leaves (jacket leaves). Curds shall be free of spots, speckles or bruises.	15	units			
4	Greens, Flat Leaf Mustard - 5 # units U.S. 1 grade, fresh, young, tender, green and free from blemishes.	5	units			
5	Greens, Kale - 5 # units U.S. 1 grade, fresh, young, tender and green. Leaves shall not be dry or yellowing, and have no evidence of insect damage.	5	units			
6	Greens, Swiss Chard - 5# units Product shall be leafy green, crisp, and free of showing yellow or brown portions, and free of insect infestation.	5	units			
7	Sweet Potatoes - 25# units U.S. 1 grade, clean, smooth, well-shaped, firm and bright in appearance. Product shall be free from internal breakdown, black rot, and other decay.	10	units			

PURCHASE PHONE QUOTE

Use this form to document requests for price quotes. Request that all quotes be FOB Destination. Attach completed form to Purchase Order.

PREPARED BY: _____ DATE PREPARED: _____

SECTION/UNIT: _____ DATE QUOTES DUE: _____

PHONE NO: _____ TIME QUOTES DUE: _____

VENDOR 1

VENDOR 2

VENDOR 3

Name _____	Name _____	Name _____
Address _____	Address _____	Address _____
Phone _____	Phone _____	Phone _____
Fax _____	FAX _____	FAX _____
Contact _____	Contact _____	Contact _____
FOB _____	FOB _____	FOB _____
Terms _____	Terms _____	Terms _____
Delivery _____	Delivery _____	Delivery _____

Comments/Specifications: _____

ITEM	DESCRIPTION	QUANTITY	VENDOR 1		VENDOR 2		VENDOR 3	
			UNIT PRICE	TOTAL PRICE	UNIT PRICE	TOTAL PRICE	UNIT PRICE	TOTAL PRICE
TOTALS								

ATTN: _____
Procurement Services
Agency Name
Street Address
City, State, Zip



Phone: _____
Fax: _____

REQUEST FOR FAXED QUOTE

THIS IS NOT AN ORDER**

Return To: _____ by **(time)** on **(date)** to fax **(xxx)xxx-xxxx**

Description: _____

Requested Availability Date of Product: _____

Contact: _____ (xxx)xxx-xxxx

Any reference to brand names is meant as descriptive not restrictive.
Alternate bids will be considered on products, which meet or exceed products indicated on quote.
Vendor is to mark clearly alternate proposals.

“OR EQUAL”: Any brand name listed in the specifications as “or equal” or “or equivalent” shall establish the minimum requirements for quality, utility, durability, function, purpose, etc. Other product brands may be offered that are equal to or better than the product brand name. Bidder may show cost differences, alternates and options in the space provided in the quote. This clause is not meant to be restrictive, but to set the minimum standard. AGENCY SHALL DETERMINE, IN ITS SOLE DISCRETION, WHETHER A PRODUCT OFFERED IS “EQUAL.” When the designation is “or equal” or “equivalent” Agency shall make its decision after Bid Closing.

Vendor Name _____ Federal ID No: _____

Address: _____ Phone: _____

City, State, Zip: _____ Fax: _____

Signature of Vendor Contact: _____

All Pricing Must Be Held Firm For 30 Days

DESCRIPTION	QUANTITY	PRICE PER UNIT	TOTAL

_____, 2012

Dear Produce Vendor:

[School District] is pleased to be seeking locally-grown produce for the upcoming [event, season, school year, etc.]. Enclosed is a vendor questionnaire and product availability and pricing forms for you to complete and submit. Feel free to make us aware of any additional products you would like us to consider, along with their specifications, pricing and availability, in the extra spaces provided on the product availability and pricing forms. Please note that the product availability and pricing form indicates the preferred product types, varieties, and conditions, but [school district] are willing to discuss other product options based on availability. Also, it is not required that you have available all products listed in the following forms.

The school district reserves the right to use other produce vendors if better pricing is available and we do not guarantee any specific ordering volumes but are happy to discuss anticipated use and any other questions by phone. Due to the inherent nature of crops and farming, we understand that a prior agreed upon amount of produce may become unavailable. If this should occur, [school district] requires 5 days notice before shipment so that other arrangements can be made. [school district] has the right to refuse produce upon delivery if it does not meet the prior agreed upon quality and pricing requirements. Arrangements regarding delivery schedules, ordering and payment will be made in [date], prior to school. [school district] accept deliveries Monday through Friday between the hours of [delivery times]. An invoice is required at the time of delivery and payment terms are net 30. If either party, [school district] or the stated vendor, wishes to terminate this agreement , a written 30 day notice is required.

We look forward to working with you to provide fresh fruits and vegetables to our students. Thank you for working with us.

Sincerely,

[District Contact information]

[School District Nutrition Program Name]

Vendor Questionnaire

Name: _____

Farm/Business Name: _____

Address: _____

Phone and/or e-mail: _____

Are you willing to deliver between the hours of [delivery times]? ☐ Yes ☐ No

Other current local customers & contact information:

Can you leave an invoice for payment at the time of delivery? ☐ Yes ☐ No

List inspections or audits, if any, your facility receives from USDA/State/Local Inspectors and their frequency (annual, bi-annual, etc.). Attach latest copies of reports and a copy of the food safety and sanitation plan for your farm/business, if applicable:

What is your credit/return policy for poor quality produce/food items?

Do you carry liability insurance? If so, for how much and with whom?

Are you available to visit school(s) and talk with students about how your products are grown?

☐ Yes ☐ No

Is your farm available for student field trips? ☐ Yes ☐ No

Vendor's Signature

Date

[Sample letter for informal procurement using fresh sheets as quotes
adapted from Arlington Public Schools]

The [school district] Food Service Program desires to serve fresh, locally grown products to its students. As such, the Food Services Department is seeking to develop a list of vendors that meet all procurement requirements from which quotes may be requested or supplied through weekly Fresh Sheets on an “as needed” basis.

Under federal law, this district, as the purchasing institution, has the authority to apply a “local” geographic preference to minimally processed foods and to determine what is “local” for the purposes of United States Department of Agriculture (USDA) programs such as the National School Lunch Program, the School Breakfast Program, the Fresh Fruits and Vegetable Program, the Special Milk Program, the Child and Adult Care Food Program, the Summer Food Service Program, and the Department of Defense Fresh Program.

This district defines “locally grown products” eligible for this geographic preference at two levels. These levels are:

1. Grown in _____, _____, or _____ Counties
2. Grown in Washington State

As allowed under federal law, the [school district] will provide a price percentage preference during evaluation of quotes to “locally grown products” purchased for school food procurement as defined under this geographic preference. The price percentage is as follows:

1. Grown in _____, _____ or _____ Counties-within 5% of the lowest overall quote
2. Grown in Washington State-within 3% of the lowest overall quote

Pursuant to USDA regulations, the geographic preference is applied only to “minimally processed” agricultural products that retain their inherent character. This includes the following:

Cooling; refrigerating; freezing; size adjustment made by peeling, slicing, dicing, cutting, chopping, shucking, and grinding; forming ground products into patties without any additives or fillers; drying/dehydration; washing; packaging (such as placing eggs in cartons), vacuum packing and bagging (such as placing vegetables in bags or combining two or more types of vegetables or fruits in a single package); addition of ascorbic acid or other preservatives to prevent oxidation of produce; butchering livestock and poultry; cleaning of fish; and the pasteurization of milk.

Fruits and Vegetables used in the past have included the following:

Broccoli	Apples
Cabbage (shredded)	Bananas
Carrots	Grapes
Cauliflower	Kiwi
Celery	Peaches (canned)
Corn (canned)	Pears
Green Beans (canned)	Pineapple (canned)
Jicama	
Lettuce (salad and shredded)	
Summer Squash	
Sweet Potatoes	
Winter Squash	

We would like to consider other varieties and types of value-added of Fruits and Vegetables, as well, including fresh and minimally-processed versions of the foods we have previously purchased in canned form.

To be placed on the quote list, please submit a letter to:

[School District contact information]

The letter must include responses to the following questions:

1. What products will you have available within the next year? (Please provide seasonal or monthly information.)
2. Are you able to pack and deliver to two main kitchens or would you want to work with a local distributor? If you can deliver, do you have a minimum delivery amount (case count, pounds, etc.)?
3. Do you have a Good Agricultural Practices, HACCP, or other third party food safety certifications? If not, please supply a copy of your farm food safety plan or respond to the questionnaire available on-line at asd.wednet.edu under the Food Services section. (maybe include a direct link, if this letter will be sent via email? Or include a copy as an email attachment or in a hard copy letter, if sending hard copy)
4. Please briefly describe your farm and growing practices. Do you have any certifications (besides food safety certification), such as Organic or Food Alliance?
5. Proof of a minimum of one million (1,000,000) dollars of liability insurance.
6. Your level of interest in partnering for education purposes (like visiting the school to speak to students, providing picture and farm description for a farm profile poster, hosting a farm visit, etc.)? If interested, please list your ideas for education about your farm or the farms you source from.

[Sample informal quote package for apple products adapted from Kent School District]

Dear Vendors

The document attached to this email message is a quote request to solicit fresh apple product availability and pricing. You are receiving this document because either you are a past vendor who has previously sold fresh produce to the [School District] or you have indicated interest in providing products in the future.

The products listed on the attached quote will be offered on our weekly menus [*when - e.g. through the end of this school year and during our summer meal program*].

This quote provides background information on estimated quantities of products. If you choose to respond to this quote, there are three specific documents you must complete and either email or fax to my attention at [school district]. The three documents are:

1. Form A: Response to Questions
2. Form B: Product Pricing
3. Checklist for Retail Purchase of local produce

The Checklist for Retail Purchase of local produce is included as part of the quote to document food safety practices that your farm or growers you represent follow. This form must be submitted annually or after any facility or procedural changes that you incorporate in your daily business practices.

We would also like your feedback on the clarity of the specifications contained within the document so we can make any necessary changes to achieve a document that will serve both the needs of vendors and the school district.

Quotes are due back by the end of business on . If you are unable to provide a quote, please either send an email with that message or return Submittal Form A after checking the box that you will not be providing a response on this quote.

Thank you.

[name], [title]
[department/division]
[district name]
Phone:
Email:

[school district] Nutrition Services Fresh Produce Quote Request:

[school district] (“District”) seeks quotes on produce that will be served to students through the National School Lunch and Breakfast Programs. The District desires to serve Washington grown products to its students. This bid request will be used to determine the vendor/vendors from whom the district will buy the products specified below for [time period].

Introduction:

The District will apply a geographic preference for Washington grown products, as follows:

- a. Under federal law, this District, as the purchasing institution, has the authority not only to apply a “local” geographic preference to minimally processed foods, but also to determine what is “local” for the purposes of United States Department of Agriculture (USDA) programs such as the National School Lunch Program, the School Breakfast Program, the Fresh Fruit & Vegetable Program, the Special Milk Program, the Child and Adult Care Food Program, the Summer Food Service Program, and the Department of Defense Fresh Program.
- b. This district defines “locally grown products” as “Washington grown,” as defined under Local Farms – Healthy Kids Act section 6 (Revised Code of Washington section 28A.335.190). That definition states, “grown and packed or processed in Washington.” This district will apply applicable federal procurement procedures.
- c. As required under federal law, this district will provide a specific advantage to vendors that can provide products that meet our defined geographic preference. We will apply a price percentage preference of 10% during evaluation of bids for vendors that can provide 100% of the product list, or acceptable substitutes, which are Washington grown.
- d. Pursuant to USDA regulations, the geographic preference in this section is applied only to “minimally processed” agricultural products that retain their inherent character.

Specifications:

The District has established the following specifications:

The District seeks the following fruit to be served on district menus from [time period]: The list below is the type of produce the District would like delivered upon award of a Purchase Order for the time period specified. The inclusion of this list in no way limits the right of the District to purchase other types of products (as available from the selected vendor/vendors) nor requires the District to purchase all the types listed.

Apples

Item	Description	Grade	Preferred Order Units
1	Apples, fresh, whole, popular eating varieties	US Extra Fancy, US Fancy	Between 163 to 113 count/CS, or 2.5 to 3 inches in diameter
2	Apples, fresh, sliced	US Extra Fancy, US Fancy	2-oz individual portioned bag
3	Apples, fresh, sliced	US Extra Fancy, US Fancy	Bulk pack (i.e. 3-lb bag)

The following specifications apply to all items in the produce list above.

- a) A 10% price preference will be given to the vendor(s) who can provide all produce that is grown and packed or processed in Washington State, either with the items listed or with substitute items that the District deems acceptable. This means that 10% of their price will be deducted FOR COMPARISON PURPOSES ONLY. After the 10% price reduction, prices will be compared between vendors. The lowest price bid will be selected and that vendor will be awarded the bid AT THE PRICE THEY ORIGINALLY QUOTED (rather than the 10% reduced price). More detail on the geographic preference can be found under Geographic Preference Evaluation System in this bid document. **If all responding vendors meet this standard, then a price preference will not be applicable.**
- b) All produce must be [*time of harvest – e.g. from 2011 late fall harvest, or more recent harvest (i.e. not stored from previous season)*].
- c) Prefer products to be without stickers on individual fruit.
- d) Produce must be delivered in clean, sanitary and appropriately temperature-controlled vehicles. Produce shall be stored at appropriate industry standard storage temperatures post-harvest, and may be unrefrigerated for transport for no longer than 6 hours.
- e) All products will be delivered to [*destination and its address*]

Evaluation and Award:

The final decision of selecting the vendor/vendors will be based on the criteria listed below. The decision resulting from the evaluation process as to which product best meets the needs of the district remains the sole responsibility of the district and is final.

- Vendor Qualifications (below) must be met.
 - Ability to provide the freshest products specified (if unable to supply specified products, please identify and list any substitutions you feel are appropriate along with their associated costs)
 - Ability to deliver to [*destination of your choice*] [*delivery schedule – e.g. on a weekly delivery schedule that meets the needs of the District Nutrition Services*]
 - Acceptable minimum order requirements
 - Acceptable response to food safety questionnaire, or proof of GAPs or other third party food safety audit/certification
- Lowest cost (as determined after application of the Geographic Preference Evaluation System).
- Numbers of varieties of whole apples available – More varieties are desirable, as long as quantities are available to fill orders of a minimum of 15 cases of any single variety.

- Freshness of minimally processed product – Vendor must indicate the number of days between when the product is processed and packaged till it is delivered to [destination/your district].
- Willingness to provide a personal visit to the school district by the vendor owner, grower or staff employed on the farm, to educate students about the farm and the products offered. Such visit should be offered at least one time at a time and place mutually agreed upon by vendor and the District Nutrition Services. (This is desired by the District and will be considered in the case of a tie.)

Geographic Preference Evaluation System:

The following point system will be used to provide an advantage for vendors that can supply Washington-grown products (to be filled in by the District). (Please note: The 10% price preference applied when out of state products are quoted with WA State products, which does not affect the price paid to you.) The preference allows the District to apply a geographic preference in the decision of which vendor will receive the order award.

YES	NO	Factor Description
		All products on the product list are sourced and packed or processed within Washington State. Points awarded based on percentage of total produce that can be sourced from within Washington, with the following seasonal availability and quantity considerations. Include farm sources, and when each product is available, on the attached produce list.
		If not able to provide 100% of those specific produce items in the market basket list, vendor provides a plan for acceptable substitutions of produce list items sourced and packed or processed within Washington State. Include the farm sources, and when each substitute product is available. [“Acceptable” substitutions are subject to bid evaluator determination, based on variety needs of the District.]
Any vendor who receives 2 YES checkmarks (meaning they can provide 100% of the volume with WA Grown listed items or acceptable substitutes) will receive a 10% price preference. This means that 10% of their price will be deducted FOR COMPARISON PURPOSES ONLY . After the price reduction, prices will be compared between vendors and the lowest price bid will be selected and that vendor will be awarded the bid.		

Buying Procedure:

The District [*department*] staff will [*method of your ordering – e.g. call or email orders in*] [*frequency of your order – e.g. once per week, giving a full week between order and delivery*]. The selected vendor will commit to delivery of full order of quality produce in good condition to [*destination of your choice – e.g. the district central kitchen*]. The District retains the right to reject any or all orders as inspected upon delivery. Damaged or unacceptable product shall be credited or replaced at the discretion of the district. Product rejected by the kitchen manager or designee due to poor quality or incorrectly filled orders shall be picked up and re-delivered within 24 hours of notification by the district. Credits shall be issued to the district for any product that was not satisfactorily delivered within the agreed upon time frame.

Invoice & Payment:

A detailed invoice must be provided with each delivery of product. The invoice should contain the following information:

1. Name, address and phone number of vendor/business selling products to the District [*department*]
2. Date of delivery
3. Itemized list of quantity, item description, unit of sale (ea, cs, lb, etc.), price per unit and extended total price for each item listed on invoice
4. Grand total of amount the District [*your department*] has to pay for the total purchase including any applicable freight or sales tax.
5. Payment by the District will be [*your payment method – e.g. net 30*] unless other terms have been discussed and agreed to

Delivery:

All deliveries shall be to [*destination of your choice – e.g. the Central Kitchen (CK) Warehouse, located in building E on the campus of the Administrative offices of the District*], located at:
[*Address*]

1. Delivery should be on the agreed upon date and time discussed with when order is placed.
2. Any changes in product availability or delivery scheduling must be immediately communicated with .
 - a. Changes in product availability must be communicated with or designee at [*phone #*].
 - b. Changes in delivery scheduling must be communicated with at [*phone #*].

Quote Responses:

Responses to this quote request may be emailed or faxed to . The email address and fax number are provided below.

1. Vendor is responsible for making sure all questions are answered, details and pricing of any of the requested products they can supply have been listed, and a current copy of the food safety questionnaire is on file or submitted with this response.
2. Vendor response must be made on forms provided with this quote request in order for response to be considered. Vendor must submit:
 - a. **Form A: Response to Questions,**
 - b. **Form B: Product Pricing (1 pages)**
 - c. **Check List for Retail Purchase of Local Produce**
3. Prices quoted should be F.O.B .
4. If freight is not included in price for purchase unit, any associated freight costs must be clearly identified and discussed with at the time of order.
5. Vendor is expected to honor prices quoted for the period of time quote request covers.
6. Contact at if you have questions or if assistance is needed.
7. **Responses due by the end of business on . The first delivery for product will be scheduled for the week of .**
8. **If a vendor chooses not to participate in this quote, they can check the box on the bottom of Submittal Form A and either fax or email the form to the phone number or email address referenced below.**

Contact Information:

[Name],[Title]

[Your School District] [Your Department]

[Your Address, zipcode]

Phone:

Email:

Main Office Phone:

Main Office Fax:

Submittal Form A: Vendor Responses to Questions: (due by end of business on Friday 4/06/2012)

Must be answered for quote to be accepted:

1. Are these prices guaranteed for all purchases from _____ through _____ Yes ☐ No ☐
2. Can you deliver orders to [your choice of destination] [freq of delivery] ? Yes ☐ No ☐ Please list day(s) and approximate time frame deliveries could be made in the chart below.

Days of Week	Mon	Tue	Wed	Thu	Fri
Time frame					

3. Do you have a minimum delivery \$, case count or total weight that must be met? Yes ☐ No ☐
- Please list any delivery parameters in the chart below.

Min. delivery \$, if any	
Min. case count, if any	
Min. total weight, if any	
Other	

4. Would you be able to provide a minimum of one educational visit by a representative of vendor (owner, grower or another on-farm staff)? Yes ☐ No ☐
5. I have read, completed, and submitted a copy of Submittal Form B: Product Pricing for the products I am able to provide if awarded the quote Yes ☐ No ☐
6. I have read, completed, signed and submitted a copy of Submittal Form C: Checklist for Retail Purchase of Local Produce (Iowa State University Form) regarding on-farm food safety practices to [Your District]? Yes ☐ Already Submitted Copy ☐ Date submitted: _____
- (Please note: Completed questionnaire will remain on file for one year from the date of submission at which a new questionnaire must be updated and submitted. If any significant changes take place during the year covered by questionnaire submitted, vendor is required to complete and submit an updated questionnaire outlining the changes affecting food safety practices. [Your District] reserves the right to audit questionnaires submitted through a personal visit to vendor's site(s) by _____).

Vendor Name:

Vendor Representative:

Contact Information: Phone:

Email:

Date Submitted:

☐ We will not be participating in this quote.

Submittal Form B: Product Pricing: (due by end of business on [date])

For April-August 2012 Vendors are asked to provide pricing and requested information on the products contained in the attached market basket.

Projected Quantity Needed	Item: Whole Apples	WA Grown? Yes or No	WA Processed? Yes -No-N/A	Name & Location of farm/grower/ Processor	Layer or Bulk Pack?	Grade	Count or Size	Order Pack Size		Guaranteed Refrigerated Shelf Life upon Delivery (days)	Order Units for quantity needed?	Price per Pack	Portion Cost per Serving	Total Price to be charged to District
20,000 apples	Apples, any variety (List varieties below)													
6,520	Variety 1: Gala	Yes	N/A	Smith Farms Royal Oaks, WA	Layer	US Ex Fancy	163	CS		21 days	40	\$25.16	.1543	\$ 1,006.40
13,040	Variety 2: Fuji	Yes	N/A	Jones Farms South River, WA	Layer	US Ex Fancy	163	CS		21 days	80	\$22.10	.1355	\$ 1,768.00
19,560	TOTALS													\$ 2,774.40
20,000 apples	Apples, any variety (List varieties below)													
	Variety 1:													
	Variety 2:													
	TOTALS													
Projected Quantity Needed	Item: Minimally Processed Apples	WA Grown? Yes or No	WA Processed? Yes or No	Name & Location of farm/grower/ Processor	Size Bag	Grade	Original Apple Size Before Slicing	Bag or LB Count per Order Pack Size	Days from Processing to Delivery at KSD NS	Guaranteed Refrigerated Shelf Life upon Delivery (days)	Order Units for Quantity Needed?	Price per Pack	Portion Cost per Serving	Total Price to be charged to District
22,500 lbs. (1,500 lbs/wk)	Bagged sliced fresh apples, 2 oz/bag Type apple: Gala	Yes	Yes	ZZZ Orchards Yakima, WA	2 oz	Fancy	150 ct	125 bags/CS	4 days	21 days	1440	\$29.25	.234	\$ 42,120.00
4,500 lbs. (300 lbs/wk)	Sliced fresh apples, bulk Type apple: Gala	Yes	Yes	ZZZ Orchards Yakima, WA	3 lb	Fancy	163 ct	6 3lb bags/CS	4 days	21 days	250	\$29.45	1.635	\$ 7,362.50
	TOTALS													\$ 49,482.50
22,500 lbs. (1,500 lbs/wk)	Bagged sliced fresh apples, 2 oz/bag Type apple:													
4,500 lbs. (300 lbs/wk)	Sliced fresh apples, bulk Type apple:													
	TOTALS													

Vendor Name:

[Sample letter announcing award decision adapted from Kent School District]

Hello:

Thank you for your response to our quote for whole and sliced apple products that will be featured on our school meal menus. We had three responses to the quote:

1. [Vendor 1]
2. [Vendor 2]
3. [Vendor 3]

I have attached a recap sheet that shares the details of the three responses. After evaluating the quotes, we will be establishing a purchase order to purchase both the whole apples and sliced apple products with _____. This purchase order will be good through _____.

Thank you for your interest in working with our program as provider of quality produce.

[name], [title]
[department/division]
[district name]
Phone:
Email:

[Sample informal seasonal produce quote request package adapted from Kent School District]

Dear Vendors

[*school district*] [*department*] has been working on a project to develop a sustainable Farm-to-School Program for the District. Our goal is to increase the volume of produce on our menu with specific emphasis on utilizing more products grown, raised, or made in Washington State.

During this past year we have evaluated our overall usage of produce and have worked on identifying additional seasonal products that could be offered to students on our menus. The next phase of the project is to develop appropriate informal and formal quote documents that incorporate geographical preference language, to send to interested vendors to document a competitive purchasing process that is required by districts operating breakfast and lunch programs under the USDA guidelines.

The quote attached to this email message is the document produced to solicit product availability and pricing from selected vendors. You are receiving this document because either you are a past vendor who has previously sold fresh produce to [*school district*] or you have indicated interest in providing products in the future.

We are primarily looking to purchase produce for [*meal service – e.g. lunch program*]. The products listed on the attached quote will be offered to [*number*] students in the district on a schedule that currently operates [*frequency of service – e.g. three days a week*].

This quote provides background information on estimated quantities of products and the projected date they will be served. If you choose to respond to this quote, there are three specific documents you must complete and either email or fax to my attention at [*department*]. The three documents are:

1. Form A: Response to Questions
2. Form B: Product Pricing
3. Checklist for Retail Purchase of local produce

The Checklist for Retail Purchase of local produce is included as part of the quote to document food safety practices that your farm or growers you represent follow. This form must be submitted annually or after any facility or procedural changes that you incorporate in your daily business practices.

We would also like your feedback on the clarity of the specifications contained within the document so we can make any necessary changes to achieve a document that will serve both the needs of vendors and the school districts making the purchases.

Quotes are due back by the end of business on . If you are unable to provide a quote, please either send an email with that message or return Submittal Form A after checking the box that you will not be providing a response on this quote.

Thank you.

[*name*], [*title*]

[*district name*]

Phone:

Email:

[school district] Nutrition Services Fresh Produce Quote Request:

Introduction:

[school district] seeks quotes on Washington-grown products that will be served to students through [meal service e.g. – lunch program]. This quote request will be used to determine the vendor/vendors from whom the district will buy products for [time period].

The list below is an example of the type of produce the District would like delivered upon award of a Purchase Order for the time period specified. The inclusion of this list does not limit the right of the District to purchase other products (as available from the selected vendor/vendors) nor requires the District to purchase all the types listed.

For February 2012

	Qty	Item	Order Units
1	1200 ct each	Apples	163 ct./case or 2.5-3 inch diameter. Will consider 125-150 ct./case
2	145 lbs.	Brussels sprouts, fresh	whole, untrimmed
3	125 lbs. as heads. or 42 lbs. as florets/trimmed	Broccoli, fresh (specify if you can provide florets)	Whole/heads, untrimmed. Or florets, trimmed (ready-to-use)
4	120 lbs.	Carrots, fresh, whole, without top	
5	120 lbs. for fingerling. Or, 125 lbs. as whole (red or similar) 185 lbs. as whole (white, Russet or similar of 120 ct.*)	Potatoes, fingerling or other variety, fresh, whole	*120 ct. = approx. 6 oz each Washed preferred – please specify if you have washed potatoes

For March 2012

	Qty	Item	Order Units
1	1200 each	Apples, 2 different varieties	163 ct./case or 2.5-3 inch diameter. Will consider 125-150 ct./case
2	1200 each	Pears – 1 variety	Small (150 ct. preferred. Will consider 120-136 ct.)
3	120 lbs.	Carrots, fresh, whole, without top	
4	96 lbs. as heads. or 66 lbs. as florets/trimmed	Cauliflower (specify if you can provide florets)	Whole/heads, untrimmed. Or florets, trimmed (ready-to-use)
5	150 lbs.	Parsnips, fresh, whole	
6	125 lbs. as whole (red or similar) 185 lbs. as whole (white, Russet or similar of 120 ct*) 120 lbs. for fingerling	Potatoes –total of 4 different varieties)	*120 ct = approx. 6 oz each Washed preferred – please specify if you have washed potatoes

Specifications:

The District has established the following specifications:

- a) A 10% price preference will be given to the vendor(s) who can provide all produce that is grown and harvested in Washington State. (If all responding vendors meet this standard, then a price preference will not be applicable.)
- b) All produce must be from *[your preferred harvest time – e.g. 2011 late fall harvest, or more recent harvest (i.e. not stored from previous season)]*.
- c) All fruit products are to be un-waxed and without stickers on individual fruit.
- d) Produce must be delivered in clean, sanitary and appropriately temperature-controlled vehicles. Produce shall be stored at appropriate industry standard storage temperatures post-harvest, and may be unrefrigerated for transport for no longer than 6 hours.
- e) All products will be delivered to _____, located at _____

Evaluation and Award:

The District reserves the right to purchase these products from multiple vendors, based on price and availability. The decision resulting from the evaluation process as to which product best meets the needs of the district remains the sole responsibility of the district and is final. The final decision of selecting the vendor/vendors will be based on the following criteria:

- Lowest cost (as determined after 10% preference adjustment is made when products from outside of Washington State are included with quote responses offering products from WA State. (Please note: The 10% price preference applied when out of state products are quoted with WA State products, does not affect the price paid to you. The preference allows *[school district] [department]* to apply a geographic preference in the decision of which vendor will receive the order award.
- Ability to provide the products specified (if unable to supply specified products, please identify and list any substitutions you feel are appropriate along with their associated costs)
- Ability to source items from WA State growers
- Ability to deliver to central kitchen on a weekly delivery schedule that meets the needs of *[school district] [department]*. Actual delivery date will be *[lead time – e.g. 2 to 3 days before menu date]* to allow proper time for meal preparation.
- Willingness to provide a personal visit to the school district by the vendor owner, grower or staff employed on the farm, to educate students about the farm and the products offered. Such visit should be offered at least one time at a time and place mutually agreed upon by vendor and *[school district] [department]*.
- Acceptable response to Checklist for Retail Purchase of Local Produce, or proof of GAPs or other third party food safety audit/certification

Buying Procedure:

[school district] staff will call or email orders in [frequency - e.g. once per week], giving [lead time – e.g. a full week] between order and delivery. The selected vendor will commit to delivery of full order of quality produce in good condition to [designated delivery location – e.g. the district central kitchen]. The District retains the right to reject any or all orders as inspected upon delivery. Damaged or unacceptable product shall be credited or replaced at the discretion of the district. Product rejected by _____ or designee due to poor quality or incorrectly filled orders shall be picked up and re-delivered within 24 hours of notification by the district. Credits shall be issued to the district for any product that was not satisfactorily delivered within the agreed upon time frame.

Invoice & Payment:

A detailed invoice must be provided with each delivery of product. The invoice should contain the following information:

1. Name, address and phone number of vendor/business selling products to [Your School District]
2. Date of delivery
3. Itemized list of quantity, item description, unit of sale (ea, cs, lb, etc.), price per unit and extended total price for each item listed on invoice
4. Grand total [school district] has to pay for the total purchase including any applicable freight or sales tax.
5. Payment by [school district] will be [payment method – e.g. net 30] unless other terms have been discussed and agreed to

Delivery:

All deliveries shall be to _____. [e.g. the Central Kitchen Warehouse, located in building E on the campus of the Administrative offices of your School District]. Campus is located at:

[Address]

1. Delivery should be on the agreed upon date and time discussed with _____ when order is placed so ample time is allowed for meal preparation.
2. Any changes in product availability or delivery scheduling must be immediately communicated with _____.
 - a. Changes in product availability must be communicated with _____ or designee at [Phone#].
 - b. Changes in delivery scheduling must be communicated with _____ at [Phone#].

Quote Responses:

Responses to this quote request may be emailed or faxed to . The email address and fax number are provided below.

1. Vendor is responsible for making sure all questions are answered, details and pricing of any of the requested products they can supply have been listed, and a current copy of the food safety questionnaire is on file or submitted with this response.
2. Vendor response must be made on forms provided with this quote request in order for response to be considered. Vendor must submit:
 - a. **Form A: Response to Questions**,
 - b. **Form B: Product Pricing (2 pages)**
 - c. **Check List for Retail Purchase of Local Produce**
3. Prices quoted should be F.O.B [Your Address].
4. If freight is not included in price for purchase unit, any associated freight costs must be clearly identified and discussed with [designated person] at the time of order.
5. Vendor is expected to honor prices quoted for the period of time quote request covers.
6. Contact if you have questions or if assistance is needed.
7. **Responses due by the end of business on . The first delivery for product will be scheduled for the week of .**
8. **If a vendor chooses not to participate in this quote, they can check the box on the bottom of Submittal Form A and either fax or email the form to the phone number or email address referenced below.**

Contact Information:

[Name],[Title]

[Your School District] [Your Department]

[Your Address, zipcode]

Phone:

Email:

Main Office Phone:

Main Office Fax:

Submittal Form A: Vendor Responses to Questions: (due by end of business on Friday 2/10/2012)

Must be answered for quote to be accepted:

1. Can you provide a weekly fresh sheet to Kent School District Nutrition Services? (by phone or email is acceptable) Yes ☐ No ☐

2. Can you deliver orders to the Kent School District Central Kitchen once per week ? Yes ☐ No ☐

Please list day(s) and approximate time frame deliveries could be made in the chart below.

Days of Week	Mon	Tue	Wed	Thu	Fri
Time frame					

3. Do you have a minimum delivery \$, case count or total weight that must be met? Yes ☐ No ☐

Please list any delivery parameters in the chart below.

Min. delivery \$, if any	
Min. case count, if any	
Min. total weight, if any	
Other	

4. Would you be able to provide a minimum of one educational visit by a representative of vendor (owner, grower or another on-farm staff)? Yes ☐ No ☐

5. I have read, completed, and submitted a copy of Submittal Form B: Product Pricing for the products I am able to provide if awarded the quote Yes ☐ No ☐

6. I have read, completed, signed and submitted a copy of Submittal Form C: Checklist for Retail Purchase of Local Produce (Iowa State University Form) regarding on-farm food safety practices to Nutrition Services (KSD NS)? Yes ☐ No ☐ Date submitted:

(Please note: Completed questionnaire will remain on file for one year from the date of submission at which a new questionnaire must be updated and submitted. If any significant changes take place during the year covered by questionnaire submitted, vendor is required to complete and submit an updated questionnaire outlining the changes affecting food safety practices. KSD NS reserves the right to audit questionnaires submitted through a personal visit to vendor's site(s) by KSD NS staff).

Vendor Name:

Vendor Representative:

Contact Information: Phone:

Email:

Date Submitted:

Submittal Form B- Page 1: Product Pricing: (due by end of business on _____)

Vendors are asked to provide pricing and the information asked for on the products contained in the attached market basket.

For February 2012

Quantity Needed	Item	Menu Date	WA Grown? Please Circle	Name of the farm/grower	Layer or Bulk Pack?	Count or Size	Pack Size	Order Units for quantity needed?	Price per Pack	Total Price to be charged to District
1200 each variety	Apples, 1 variety (List variety below)									
1200 each	Variety:	2/29	Yes	No						
145 lbs.	Brussels Sprouts, fresh, whole	TBD	Yes	No						
125 lbs.	Broccoli, fresh (specify if you can provide florets – 42 lbs.)	TBD	Yes	No						
120 lbs.	Carrots, fresh, top off	2/28	Yes	No						
120 lbs.	Potatoes, fingerling, fresh, whole	2/23	Yes	No						
	Substitute:		Yes	No						
	Substitute:		Yes	No						

☐ **We will not be participating in this quote.**

Continue on to next page for March 2012

Vendor Name:

Submittal Form B- Page 2: Product Pricing: (due by end of business on Friday 2/10/2012)

For March 2012

Quantity Needed	Item	Menu Date	WA Grown? Please Circle	Name of the farm/grower	Layer or Bulk Pack?	Count or Size	Pack Size	Order Units for quantity needed?	Price per Pack	Total Price to be charged to District
1200 each variety	Apples, 2 different varieties (List each variety below)									
1200 each	Variety 1:	3/14	Yes No							
1200 each	Variety 2:	3/28	Yes No							
1200 each	Pears, whole (please specify variety)	3/20	Yes No							
120 lbs.	Carrots, fresh, top off	3/27	Yes No							
96 lbs.	Cauliflower, fresh, whole (specify if you can provide florets – 66 lbs.)	3/13	Yes No							
150 lbs.	Parsnips, fresh, whole	3/1	Yes No							
	Potatoes, 2 different varieties (List each variety below)									
	Variety 1:	3/8	Yes No							
	Variety 2:	3/15	Yes No							
	Substitute:		Yes No							

☐ **We will not be participating in this quote.**

Vendor Name:

[Sample informal seasonal produce quote request package adapted from Kent School District]

Dear Vendors

[*school district*] [*department*] has been working on a project to develop a sustainable Farm-to-School Program for the District. Our goal is to increase the volume of produce on our menu with specific emphasis on utilizing more products grown, raised, or made in Washington State.

During this past year we have evaluated our overall usage of produce and have worked on identifying additional seasonal products that could be offered to students on our menus. The next phase of the project is to develop appropriate informal and formal quote documents that incorporate geographical preference language, to send to interested vendors to document a competitive purchasing process that is required by districts operating breakfast and lunch programs under the USDA guidelines.

The quote attached to this email message is the document produced to solicit product availability and pricing from selected vendors. You are receiving this document because either you are a past vendor who has previously sold fresh produce to [*school district*] or you have indicated interest in providing products in the future.

We are primarily looking to purchase produce for [*meal service – e.g. lunch program*]. The products listed on the attached quote will be offered to [*number*] students in the district on a schedule that currently operates [*frequency of service – e.g. three days a week*].

This quote provides background information on estimated quantities of products and the projected date they will be served. If you choose to respond to this quote, there are three specific documents you must complete and either email or fax to my attention at [*department*]. The three documents are:

1. Form A: Response to Questions
2. Form B: Product Pricing
3. Checklist for Retail Purchase of local produce

The Checklist for Retail Purchase of local produce is included as part of the quote to document food safety practices that your farm or growers you represent follow. This form must be submitted annually or after any facility or procedural changes that you incorporate in your daily business practices.

We would also like your feedback on the clarity of the specifications contained within the document so we can make any necessary changes to achieve a document that will serve both the needs of vendors and the school districts making the purchases.

Quotes are due back by the end of business on . If you are unable to provide a quote, please either send an email with that message or return Submittal Form A after checking the box that you will not be providing a response on this quote.

Thank you.

[*name*], [*title*]

[*district name*]

Phone:

Email:

[school district] Nutrition Services Fresh Produce Quote Request:

Introduction:

[school district] seeks quotes on Washington-grown products that will be served to students through [meal service e.g. – lunch program]. This quote request will be used to determine the vendor/vendors from whom the district will buy products for [time period].

The list below is an example of the type of produce the District would like delivered upon award of a Purchase Order for the time period specified. The inclusion of this list does not limit the right of the District to purchase other products (as available from the selected vendor/vendors) nor requires the District to purchase all the types listed.

For February 2012

	Qty	Item	Order Units
1	1200 ct each	Apples	163 ct./case or 2.5-3 inch diameter. Will consider 125-150 ct./case
2	145 lbs.	Brussels sprouts, fresh	whole, untrimmed
3	125 lbs. as heads. or 42 lbs. as florets/trimmed	Broccoli, fresh (specify if you can provide florets)	Whole/heads, untrimmed. Or florets, trimmed (ready-to-use)
4	120 lbs.	Carrots, fresh, whole, without top	
5	120 lbs. for fingerling. Or, 125 lbs. as whole (red or similar) 185 lbs. as whole (white, Russet or similar of 120 ct.*)	Potatoes, fingerling or other variety, fresh, whole	*120 ct. = approx. 6 oz each Washed preferred – please specify if you have washed potatoes

For March 2012

	Qty	Item	Order Units
1	1200 each	Apples, 2 different varieties	163 ct./case or 2.5-3 inch diameter. Will consider 125-150 ct./case
2	1200 each	Pears – 1 variety	Small (150 ct. preferred. Will consider 120-136 ct.)
3	120 lbs.	Carrots, fresh, whole, without top	
4	96 lbs. as heads. or 66 lbs. as florets/trimmed	Cauliflower (specify if you can provide florets)	Whole/heads, untrimmed. Or florets, trimmed (ready-to-use)
5	150 lbs.	Parsnips, fresh, whole	
6	125 lbs. as whole (red or similar) 185 lbs. as whole (white, Russet or similar of 120 ct*) 120 lbs. for fingerling	Potatoes –total of 4 different varieties)	*120 ct = approx. 6 oz each Washed preferred – please specify if you have washed potatoes

Specifications:

The District has established the following specifications:

- a) A 10% price preference will be given to the vendor(s) who can provide all produce that is grown and harvested in Washington State. (If all responding vendors meet this standard, then a price preference will not be applicable.)
- b) All produce must be from *[your preferred harvest time – e.g. 2011 late fall harvest, or more recent harvest (i.e. not stored from previous season)]*.
- c) All fruit products are to be un-waxed and without stickers on individual fruit.
- d) Produce must be delivered in clean, sanitary and appropriately temperature-controlled vehicles. Produce shall be stored at appropriate industry standard storage temperatures post-harvest, and may be unrefrigerated for transport for no longer than 6 hours.
- e) All products will be delivered to _____, located at _____

Evaluation and Award:

The District reserves the right to purchase these products from multiple vendors, based on price and availability. The decision resulting from the evaluation process as to which product best meets the needs of the district remains the sole responsibility of the district and is final. The final decision of selecting the vendor/vendors will be based on the following criteria:

- Lowest cost (as determined after 10% preference adjustment is made when products from outside of Washington State are included with quote responses offering products from WA State. (Please note: The 10% price preference applied when out of state products are quoted with WA State products, does not affect the price paid to you. The preference allows *[school district] [department]* to apply a geographic preference in the decision of which vendor will receive the order award.
- Ability to provide the products specified (if unable to supply specified products, please identify and list any substitutions you feel are appropriate along with their associated costs)
- Ability to source items from WA State growers
- Ability to deliver to central kitchen on a weekly delivery schedule that meets the needs of *[school district] [department]*. Actual delivery date will be *[lead time – e.g. 2 to 3 days before menu date]* to allow proper time for meal preparation.
- Willingness to provide a personal visit to the school district by the vendor owner, grower or staff employed on the farm, to educate students about the farm and the products offered. Such visit should be offered at least one time at a time and place mutually agreed upon by vendor and *[school district] [department]*.
- Acceptable response to Checklist for Retail Purchase of Local Produce, or proof of GAPs or other third party food safety audit/certification

Buying Procedure:

[school district] staff will call or email orders in [frequency - e.g. once per week], giving [lead time – e.g. a full week] between order and delivery. The selected vendor will commit to delivery of full order of quality produce in good condition to [designated delivery location – e.g. the district central kitchen]. The District retains the right to reject any or all orders as inspected upon delivery. Damaged or unacceptable product shall be credited or replaced at the discretion of the district. Product rejected by or designee due to poor quality or incorrectly filled orders shall be picked up and re-delivered within 24 hours of notification by the district. Credits shall be issued to the district for any product that was not satisfactorily delivered within the agreed upon time frame.

Invoice & Payment:

A detailed invoice must be provided with each delivery of product. The invoice should contain the following information:

1. Name, address and phone number of vendor/business selling products to [Your School District]
2. Date of delivery
3. Itemized list of quantity, item description, unit of sale (ea, cs, lb, etc.), price per unit and extended total price for each item listed on invoice
4. Grand total [school district] has to pay for the total purchase including any applicable freight or sales tax.
5. Payment by [school district] will be [payment method – e.g. net 30] unless other terms have been discussed and agreed to

Delivery:

All deliveries shall be to . [e.g. the Central Kitchen Warehouse, located in building E on the campus of the Administrative offices of your School District]. Campus is located at:

[Address]

1. Delivery should be on the agreed upon date and time discussed with when order is placed so ample time is allowed for meal preparation.
2. Any changes in product availability or delivery scheduling must be immediately communicated with .
 - a. Changes in product availability must be communicated with or designee at [Phone#].
 - b. Changes in delivery scheduling must be communicated with at [Phone#].

Quote Responses:

Responses to this quote request may be emailed or faxed to . The email address and fax number are provided below.

1. Vendor is responsible for making sure all questions are answered, details and pricing of any of the requested products they can supply have been listed, and a current copy of the food safety questionnaire is on file or submitted with this response.
2. Vendor response must be made on forms provided with this quote request in order for response to be considered. Vendor must submit:
 - a. **Form A: Response to Questions**,
 - b. **Form B: Product Pricing (2 pages)**
 - c. **Check List for Retail Purchase of Local Produce**
3. Prices quoted should be F.O.B [Your Address].
4. If freight is not included in price for purchase unit, any associated freight costs must be clearly identified and discussed with [designated person] at the time of order.
5. Vendor is expected to honor prices quoted for the period of time quote request covers.
6. Contact if you have questions or if assistance is needed.
7. **Responses due by the end of business on . The first delivery for product will be scheduled for the week of .**
8. **If a vendor chooses not to participate in this quote, they can check the box on the bottom of Submittal Form A and either fax or email the form to the phone number or email address referenced below.**

Contact Information:

[Name],[Title]

[Your School District] [Your Department]

[Your Address, zipcode]

Phone:

Email:

Main Office Phone:

Main Office Fax:

Submittal Form A: Vendor Responses to Questions: (due by end of business on Friday 2/10/2012)

Must be answered for quote to be accepted:

1. Can you provide a weekly fresh sheet to Kent School District Nutrition Services? (by phone or email is acceptable) Yes ☐ No ☐

2. Can you deliver orders to the Kent School District Central Kitchen once per week ? Yes ☐ No ☐

Please list day(s) and approximate time frame deliveries could be made in the chart below.

Days of Week	Mon	Tue	Wed	Thu	Fri
Time frame					

3. Do you have a minimum delivery \$, case count or total weight that must be met? Yes ☐ No ☐

Please list any delivery parameters in the chart below.

Min. delivery \$, if any	
Min. case count, if any	
Min. total weight, if any	
Other	

4. Would you be able to provide a minimum of one educational visit by a representative of vendor (owner, grower or another on-farm staff)? Yes ☐ No ☐

5. I have read, completed, and submitted a copy of Submittal Form B: Product Pricing for the products I am able to provide if awarded the quote Yes ☐ No ☐

6. I have read, completed, signed and submitted a copy of Submittal Form C: Checklist for Retail Purchase of Local Produce (Iowa State University Form) regarding on-farm food safety practices to Nutrition Services (KSD NS)? Yes ☐ No ☐ Date submitted:

(Please note: Completed questionnaire will remain on file for one year from the date of submission at which a new questionnaire must be updated and submitted. If any significant changes take place during the year covered by questionnaire submitted, vendor is required to complete and submit an updated questionnaire outlining the changes affecting food safety practices. KSD NS reserves the right to audit questionnaires submitted through a personal visit to vendor's site(s) by KSD NS staff).

Vendor Name:

Vendor Representative:

Contact Information: Phone:

Email:

Date Submitted:

Submittal Form B- Page 1: Product Pricing: (due by end of business on _____)

Vendors are asked to provide pricing and the information asked for on the products contained in the attached market basket.

For February 2012

Quantity Needed	Item	Menu Date	WA Grown? Please Circle		Name of the farm/grower	Layer or Bulk Pack?	Count or Size	Pack Size	Order Units for quantity needed?	Price per Pack	Total Price to be charged to District
1200 each variety	Apples, 1 variety (List variety below)										
1200 each	Variety:	2/29	Yes	No							
145 lbs.	Brussels Sprouts, fresh, whole	TBD	Yes	No							
125 lbs.	Broccoli, fresh (specify if you can provide florets – 42 lbs.)	TBD	Yes	No							
120 lbs.	Carrots, fresh, top off	2/28	Yes	No							
120 lbs.	Potatoes, fingerling, fresh, whole	2/23	Yes	No							
	Substitute:		Yes	No							
	Substitute:		Yes	No							

☐ **We will not be participating in this quote.**

Continue on to next page for March 2012

Vendor Name:

Submittal Form B- Page 2: Product Pricing: (due by end of business on Friday 2/10/2012)

For March 2012

Quantity Needed	Item	Menu Date	WA Grown? Please Circle	Name of the farm/grower	Layer or Bulk Pack?	Count or Size	Pack Size	Order Units for quantity needed?	Price per Pack	Total Price to be charged to District
1200 each variety	Apples, 2 different varieties (List each variety below)									
1200 each	Variety 1:	3/14	Yes No							
1200 each	Variety 2:	3/28	Yes No							
1200 each	Pears, whole (please specify variety)	3/20	Yes No							
120 lbs.	Carrots, fresh, top off	3/27	Yes No							
96 lbs.	Cauliflower, fresh, whole (specify if you can provide florets – 66 lbs.)	3/13	Yes No							
150 lbs.	Parsnips, fresh, whole	3/1	Yes No							
	Potatoes, 2 different varieties (List each variety below)									
	Variety 1:	3/8	Yes No							
	Variety 2:	3/15	Yes No							
	Substitute:		Yes No							

☐ **We will not be participating in this quote.**

Vendor Name: